



S&O Capital

Real results. Lasting impact.

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HELPING YOUR ORGANISATION SUCCEED WITH PREMIUM PROFESSIONAL SERVICES

We are the go-to partner for regulated industries like financial services, healthcare and pharma, offering hands-on expertise in business growth, AI & digital transformation, operational efficiency and compliance.

We don't just advise, we work alongside your teams to deliver measurable, high-impact results.

Who we are



Elite Expertise:

S&O Capital is an international firm composed of **senior experts** with decades of combined experience in regulated industries, including financial services and healthcare.



Confidential and Trusted Advisors:

We operate with absolute discretion, acting as **trusted partners to executive teams** who rely on our guidance to execute critical business transformations.



Hands-on Approach:

We collaborate directly with your teams, ensuring that strategies are not only formulated but also **executed seamlessly**, driving real, **tangible outcomes**.



**“Integrity, commitment,
impact. Our values are not
hanging on the wall, but
applied in everything we
do as a team.”**

Alessio Colantonio
Chief Executive Officer



What we bring



Revenue Growth & Market Expansion: We don't just plan; **we execute**. From defining market entry strategies across EMEA to directly securing new business partnerships, **we deliver increased revenues** and tangible results.



Operational Efficiency: By reengineering processes and coaching your teams in Project Delivery and ITSM practices, we improve workflows and reduce operational bottlenecks, **reducing time-waste and resource consumption**.



Industry 4.0 Digitalisation: We provide access to cutting-edge digital solutions and Industry 4.0 expertise, **helping your organisation implement** the latest in automation, AI, and digital tools that would otherwise be beyond reach.



Compliance & Risk Management: We identify critical gaps in your regulatory and corporate compliance, then work alongside your team to close those gaps, ensuring you **reduce your cost of risk**.



THE CHALLENGES WE HELP YOU SOLVE

Revenue Stagnation,
Operational Inefficiencies,
Technological Debt,
High cost of Compliance.

S&O Capital will tailor a custom solution for your organisation.

Why choose S&O Capital



Elite, Senior-Only Teams: S&O Capital's experts possess decades of hands-on experience. Our clients are supported by senior professionals from start to finish, ensuring the **highest level of expertise and execution** throughout.



Bespoke Solutions, Not Off-the-Shelf: We reject the one-size-fits-all approach. Every strategy and action plan is **custom-tailored** to the specific challenges and goals of your business.



Hands-On, Measurable Impact: We do more than offer guidance and step away. Our specialists actively engage with your team to apply strategies that generate measurable outcomes. **We accompany you at every step, from planning to execution.**



Exclusive Client Base: By working with only a select group of clients, **we ensure focused, undivided attention**. This approach allows us to become true partners to our clients, providing deeper involvement and commitment than larger firms juggling numerous accounts.



Rapid Execution, High-Quality Delivery: Our lean teams enable **quicker decision-making and agile execution**, delivering premium-quality results—advantages that larger firms with cumbersome structures often cannot match.



Specialists in Regulated Industries: We are well-versed in the unique complexities and regulatory challenges faced while operating in regulated industries. We provide insights and strategies **specifically designed for high-stakes, heavily regulated environments**.



Lufthansa Group testimonial: 1.2 M€ savings in 7 months

Transporting over 100 million passengers annually, the **Lufthansa Group** is one of the largest players in aviation and transportation. With more than 115,000 employees and annual revenues exceeding €37 billion, the Group engaged S&O Capital to deliver a specific **OPEX efficiency target**: a goal we successfully achieved by optimising the ITSM processes of their international contact centre, Lufthansa InTouch.







Client Testimonial:



Lufthansa

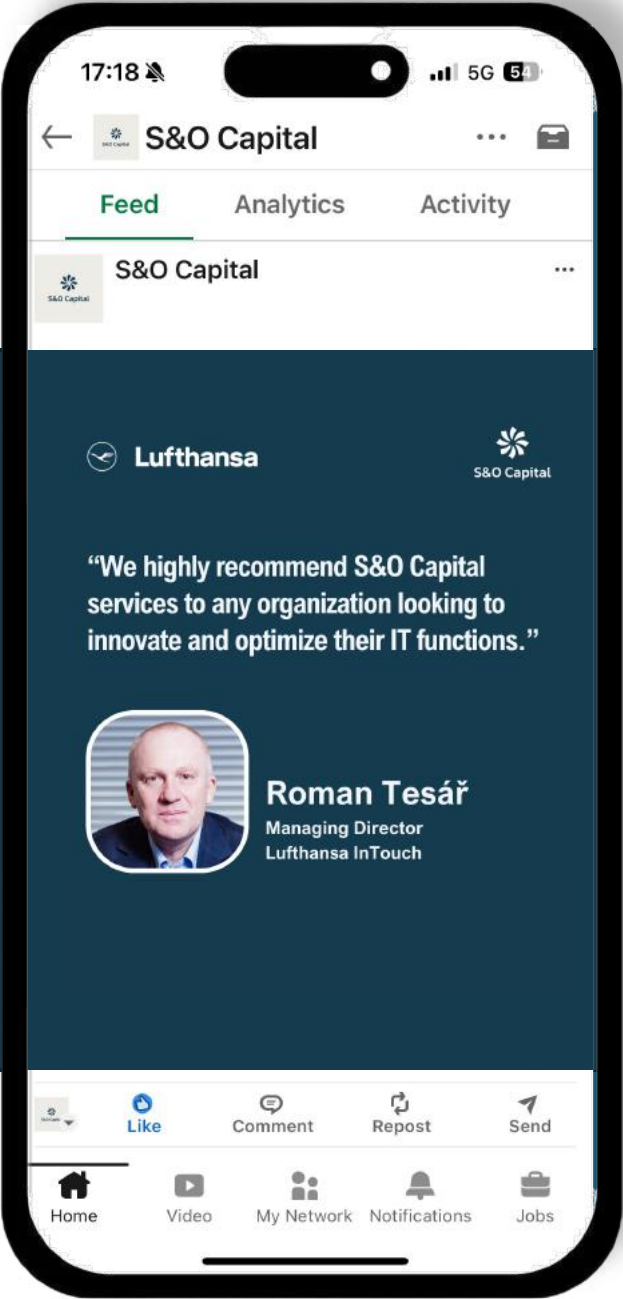
Efficient OPEX reduction

Working with S&O Capital has been a **game-changer** for our IT Service Management. Their team of **senior experts** enabled us to adopt a more data-driven approach, leading to **significant efficiency gains** in our back office. Despite a limited timeframe, they ensured no disruption to our existing operations and applied a results-driven delivery model, easily replicable across locations.

A data-driven approach

A key differentiating factor has been S&O Capital's ability to **approach our operational challenge from a business point of view**, using a data-driven approach to plan and execute with us an enhancement program that, in addition to operational benefits, has **increased the maturity of our internal team**.

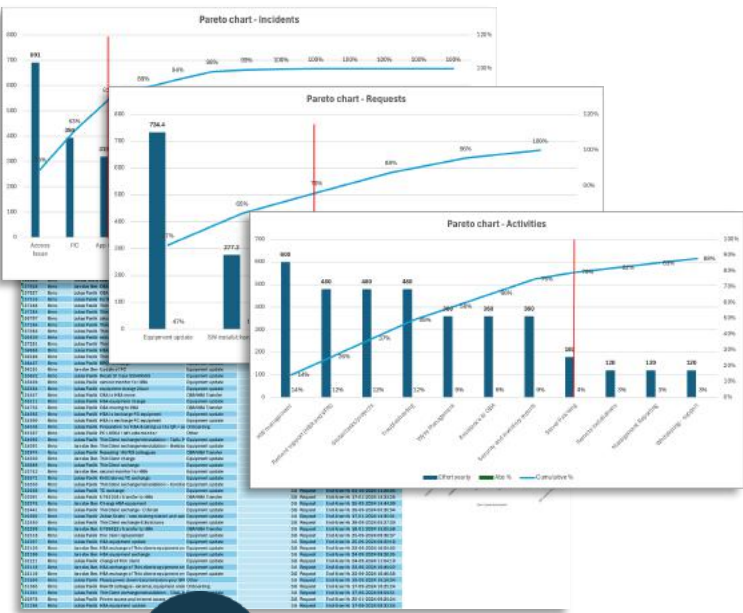
S&O Capital developed data-driven solutions that enhanced an already mature ITSM practice, driving **new levels of efficiency**, enabling **real-time access to business insights**, and creating room in the company's OPEX to **unlock growth**.



Lufthansa Group Testimonial: overdelivering in OPEX Optimisation

The Lufthansa Group tasked S&O Capital to deliver 4 FTEs savings to their large operation centre in Czech Republic. The Group has recently acquired ITA (formerly Alitalia), the flagship carrier in Italy, and the centre in Czech Republic needed to create sufficient space in their OPEX to absorb new volumes.

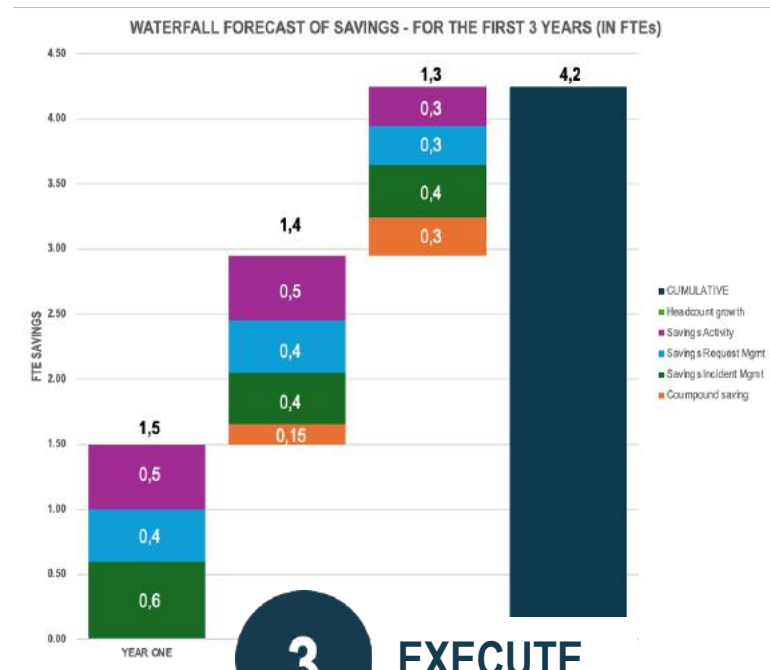
Applying S&O Capital's methodology, we were able to quickly identify the areas for intervention, define a specific intervention plan and execute it. **The targeted OPEX reduction was of 1 MI. EUR in hard savings, to be realised within the same fiscal year. We exceeded targets delivering 1,2 MI. EUR.**



1 ANALYSE



2 PLAN



3 EXECUTE

Leading European insurance subsidiary of Global Banking Group: Concrete Strategic Advisory

Serving approximately 80 million customers globally, our Client is a global leader in insurance and personal protection. With around 9,000 employees and generating over €36 billion in annual premium income, the Company engaged S&O Capital to support their strategy definition, execution and implementation. Specifically, their NORDICS region commissioned specific support in the context of their 2025/2030 growth strategy.

*: in compliance with NDA and commercial clauses



Client testimonial:

Leading European insurance subsidiary of a Global Banking Group*

Clarity in communication

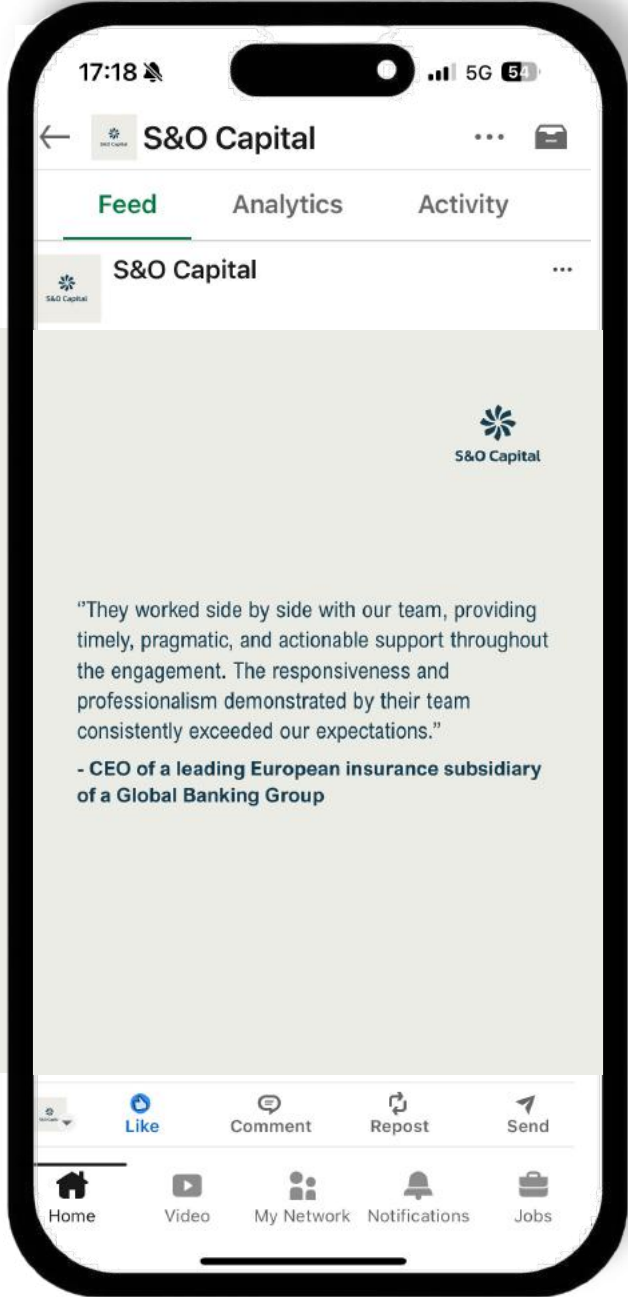
In early 2025, we engaged S&O Capital to support us in better **communication of our business strategy**, with a specific focus on investor relations. Their team played a key role in helping us **bring clarity** to our mission and develop a set of messages that communicate our value and direction effectively to shareholders and stakeholders.

Delivery oriented

What set S&O Capital apart was not just the quality of their strategic input, but their **highly delivery-oriented approach**.

We are very pleased with the results of this collaboration and look forward to continuing our partnership with S&O Capital in the future.

S&O Capital was engaged through our transparent **retainer model**, which allowed our Client to secure flexible support as they navigated an ever-changing scope and shifting priorities.



Leading European insurance subsidiary of Global Banking Group: Concrete Strategic Advisory

- Retainer-based engagement, mostly chosen because of:
 - Large scope of needed support and expertise
 - Low predictability of tasks and activities
 - Uncertainty of project duration
- Supported the Client on strategic decision-making and subsequent engagement with investors
- Not just advice: **real, hands-on production** of support materials and concrete deliverables.
- Topics ranging from "how to address low penetration rates on Creditor Protection Insurance products" to "how to reduce the time to market for micro-services based native apps".



Atlas Copco Testimonial: Doubling Productivity of the PMO dept.

With over 50,000 employees worldwide and revenues exceeding €10 billion, the **Atlas Copco Group** is a global leader in Industrial Technology, with a strong European presence and a captive centre for F&A, R&D, and Technology located in the Czech Republic. They sought S&O Capital's expertise to **streamline processes** and **enhance project execution**.

Atlas Copco Group

S&O Capital

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Client Testimonial: Atlas Copco Group

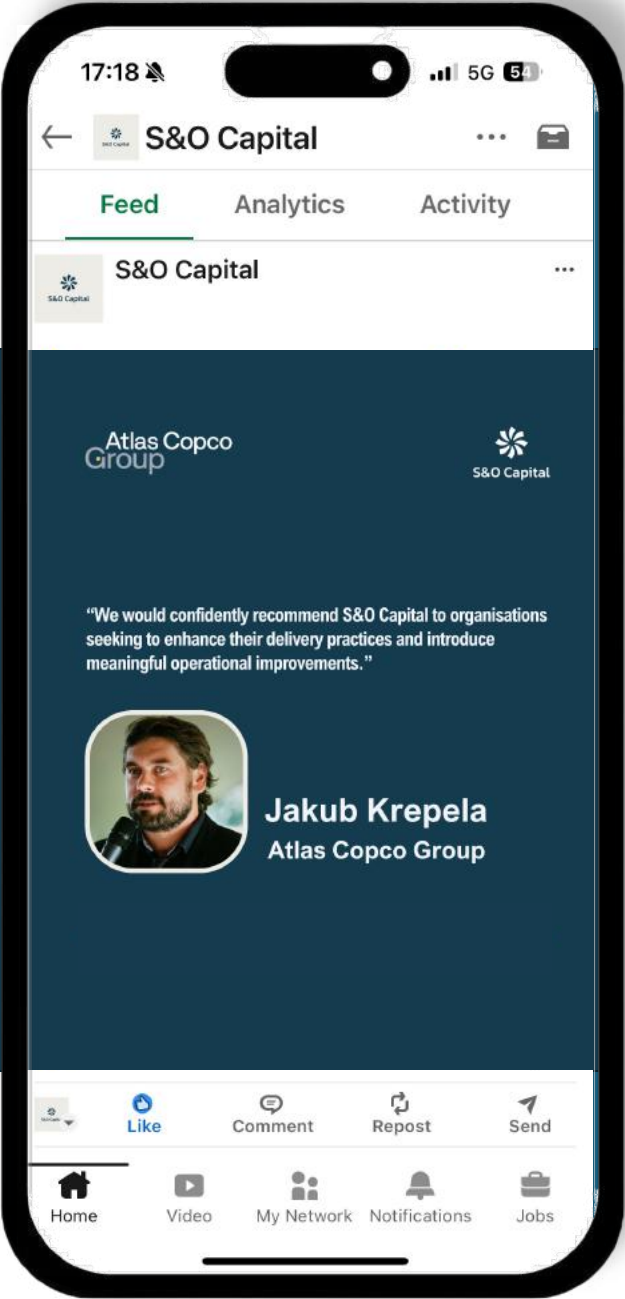
Tailored to specific needs

"We were very pleased with the work delivered by **S&O Capital**. Their approach was practical, well-structured, and **specifically tailored** to address the needs of our organisation. The team **took the time to understand** our challenges, providing tools and techniques that are directly applicable to our work."

Tangible & concrete

"The pre-workshop period spent with S&O Capital representatives proved **invaluable** in identifying areas for improvement. The **delivery was engaging** and focused on providing **real-world solutions**, which our team found both relevant and valuable."

S&O Capital led the initiative, delivering **tailored, tangible solutions** that significantly improved outcomes, earning high praise from the client.



+8,5M€

ENABLE YOUR TEAMS TO DO MORE WITH LESS

With S&O Capital's support, Atlas Copco's Project Management Organization significantly improved their project delivery capabilities, increasing project portfolio value by **€8,47 million YoY*** through enhanced staff competencies, streamlined processes, and our hands-on execution.

* Increase measured on the cumulative value of ongoing projects within the Company's portfolio, with less than 5% variation on team size.





AVERAGE SATISFACTION SCORE

96%

“ Tailored to our needs.”

“Remarkable technical expertise, coupled with concrete and actionable advice.”

“ [...] real action points to improve digital delivery”

“ [...] activity was aimed specifically at our company”

“[...] You can tell they’ve been there before and have successfully dealt with these issues before”

“Excellence in delivery is our promise; partnering with us is an investment in achieving your goals.”

Paolo Lamperti

Vice President – Global Delivery





INCREASE WORKING CAPITAL BY REDUCING COST OF RISK

+5M€

In 2024 alone, our compliance services helped avoid more than **€5 million*** in regulatory penalties by improving audit pass rates from 70% to 96%.

* Estimated penalty amount imposed by Insurance regulator, in case of demonstrated compliance breach. Group audit executed independently to verify improved levels of compliance.



PROVIDE BETTER EXPERIENCES TO YOUR CUSTOMERS

+38%

Enhanced digital interfaces and customer interaction tools have led to an increase in customer satisfaction scores by **over 38%***, driving retention and loyalty.

This was measured by a reduction in churn rates for both digital and *phygital* funnels, as well as an increase in Net Promoter Score (NPS) into the double digits.

* CSAT scores increased thanks to the introduction of product roadmaps integrated with customer feedback, self-service knowledge base and regular surveys.

A low-angle shot of a modern glass skyscraper reaching towards a sunset sky. The building's glass facade reflects the warm orange and yellow light of the setting sun, creating a dramatic silhouette effect. The sky transitions from a deep blue at the top to a bright orange near the horizon.

IMPROVE OPERATIONAL EFFICIENCY

+44%

Process optimization typically results in a **22% reduction*** in operating expenses (OPEX) and up to a **44% increase**** in process efficiency, as measured by reductions in lead times and the number of process deviations.

* Reduction measured in FTE consumption at constant process volumes.

** Reduction measured in average task lead time and number of process defects per transaction.

It's time to take action



Inability to innovate

75%

of IT departments' budgets are spent on maintaining legacy systems*.



Increasing compliance cost

\$85 B.

total cost of of compliance reached by Financial Institutions in 2023 across EMEA.**



Lack of automation

30%

of gross profit margin is typically lost to inefficiencies and manual processes.***

Is your organisation doing enough to monetise its transformation, reduce risk and secure growth?

Write us for a free consultation:

info@socapitalgroup.com



S&O Capital

Real results. Lasting impact.

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